JPL D-15073, Rev. A

Product Data Management System
Version 1.0

PDMS USER'S GUIDE

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2 USING THIS MANUAL

1. INTRODUCTION

1.1. OVERVIEW OF PDMS

Product data consists of all engineering data and information generated by any JPL program, project, or task. The Product Data Management Services (PDMS) process provides JPL with a system to maintain such data and information according to standard product data management processes, practices, and guidelines. The interactive multi-user system developed to facilitate this process, called the Product Data Management System (also abbreviated PDMS), provides all necessary indexing, referencing, storage, and retrieval functions via a networked environment that provides secure access by personnel at JPL and around the World via the Internet.

1.2. USER INTERFACE

PDMS provides access to virtually all computers at JPL by providing both:

1) Netscape Navigator, Internet browser type access, and

2) X-Windows "graphical-based" user interface.

Netscape Navigator, with which the user may already be familiar , is a popular "web browser." It allows access of PDMS for virtually all functions. Using the Netscape Navigator one can:

1) Attach (associate) files to a record

2) Detach (delete) files from a record,

3) Update (replace) files with records.

4) Copy out files from a record, without reserving the record

See section 4. for more information on using Netscape Navigator®.

X-Windows is a "graphical-based" user-interface. It is similar to the user interface employed for the Macintosh and Microsoft Windows, which use a "mouse" (or some other "pointing device") to interact with windows or objects on a computer screen. Due to its graphical nature, X-Windows requires that workstations have considerable CPU power, screen resolution, video memory and disk storage as well as networking capabilities. High-end workstations (such as Sun Sparcs, SGIs, HPs, DEC Alphas, etc.) typically have X-Windows capabilities included. Intel Pentium®-based PCs with Windows 95, and Macintosh computers that have the necessary "power" can access PDMS using X-Windows by running third-party X-Windows software, such as Reflections X® The PDMS user interface is functionally identical whether using Netscape Navigator® or X-Windows. The structure and function of the Common User Access (CUA) compliant pull-down menus are the same for both Netscape Navigator® and X-Windows. The main difference between Netscape Navigator® and X-Windows is that X-Windows allows the creation of a record, and Netscape Navigator® does not yet have this function implemented.

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1. INTRODUCTION
3. WHAT'S NEEDED

2. USING THIS MANUAL

2.1. ORGANIZATION

The PDMS User's Guide has ten (10) sections that cover the following topics:

Introduction
Using This Manual
What's Needed
Using Netscape Navigator®
Getting Started With PDMS
Generating Reports in PDMS
Command or Menu Summary
Quick Reference Guide
Glossary
Error Messages

2.2. PROCESS FLOWS

2.2.1. How to obtain a user account

Flow chart for new user

Requested user account process
[Insert chart here]

2.2.2. Netscape Navigator® PDMS Access Process

Accessing PDMS with Netscape Navigator®
[Insert flow chart here]

2.2.3. Sherpa PDMS access process

Accessing PDMS with the Sherpa interface
Flow chart for user on X Windows
[Insert Chart here]

2.3. RELATED DOCUMENTS

http://security.jpl.nasa.gov/jpl_only/security.html, for computer and network security information.
JPL Supported Core Products Document , provides information on supported hardware and software

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2.USING THIS MANUAL
4.GETTING STARTED WITH NETSCAPE NAVIGATOR®

3. WHAT'S NEEDED

A PDMS user account and a workstation or microcomputer with the following are required to use PDMS:

1) A connection to JPL HINET. Properly installed and configured network hardware. Call the JPL Help Desk for any equipment configuration questions at 4-4357
2) Properly installed and configured communication software. Call the JPL Help Desk at 4-4357, or the PDMS Help Desk at 4-9714
3) One of the following: (go to http://eis.jpl.nasa.gov/fil/startup.html)
   a) AFS [Andrew File System] password and login I.D authentication account. This AFS service is free.
   b) AFS account with at least 10mb of disk space. A monthly charge for this AFS service is incurred.
4) User must be listed in the JPL X500 database.

The JPL Help Desk (Ex. 4-HELP, 44357) can provide information, consulting and technical assistance in obtaining HYNET connections, obtaining and configuring hardware and software for connection to PDMS.

3.1. OBTAINING A PDMS ACCOUNT

Note: If the user wishes only to browse or view, and does not need the capability to create or modify records, this user will not need a PDMS account.

PDMS accounts are obtained over the network via the Netscape Navigator®. Simply access the PDMS web site (HTTP://www-pdms.jpl.nasa.gov) and go to the "Help Desk" and select "create New Account" or simply go to "Create New Account Wizard." The URL HTTPs://www-pdms.jpl.nasa.gov/Newacct should also work to get a new user to the Create New Account Wizard. The user will need to be on X500 and have an AFS account with login ID and password, for the successful completion of the process.

> **Note**: a full account with disk space from AFS is not required if the user does not want to create or modify records

After completing this electronic form, a temporary certificate is issued, the user will be notified by e-mail that a temporary certificate is issued and the request is being processed. Please be sure to follow all the instructions accompanying it, or the user will not have full access. These instructions will send the user to a URL where that user's certificate will be issued.

3.1.1. Certificates

An electronic certificate will be granted each qualified user, needing read write access. After accessing https://pdms,jpl.nasa.gov/Newacct/cert.html, the following screens will be displayed. Each screen explains a portion of the process of obtaining a certificate. Read them carefully.

Figure 3-1 PDMS Certificate Welcome screen

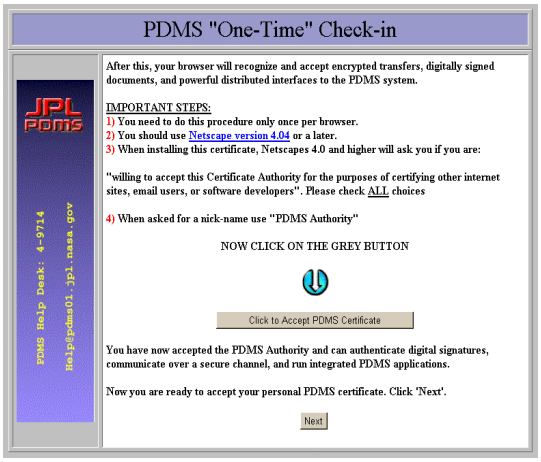


Figure 3-2 PDMS acceptance screen

After selecting “accept PDMS certificate” the following series of screens will come up.

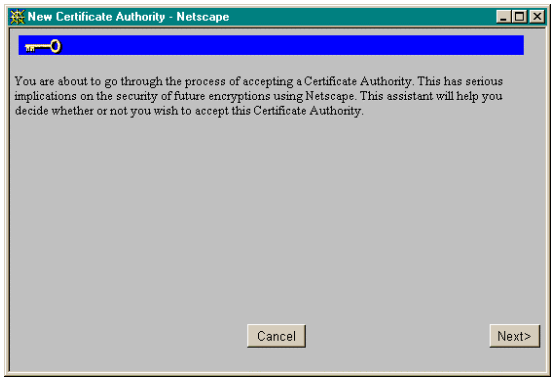


Figure 3-3 PDMS Acceptance Screen 2

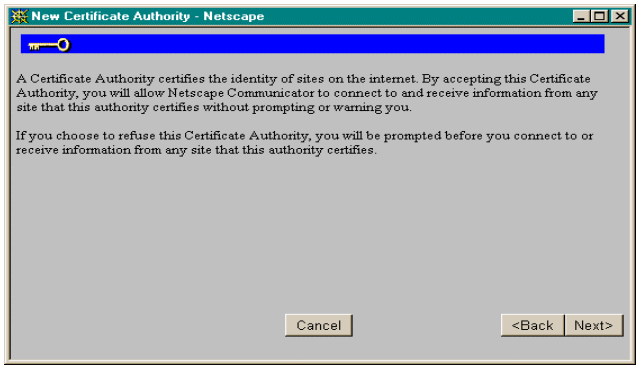


Figure 3-4 PDMS Acceptance Screen 3

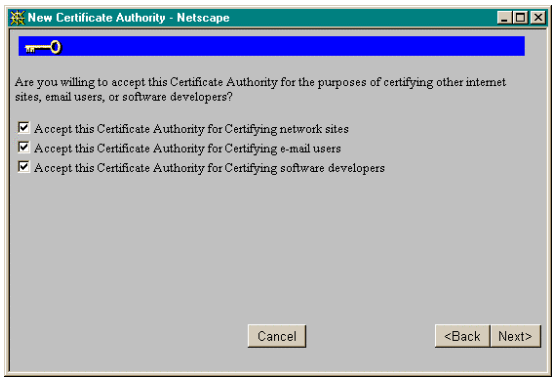


Figure 3-5 PDMS Acceptance Screen 4

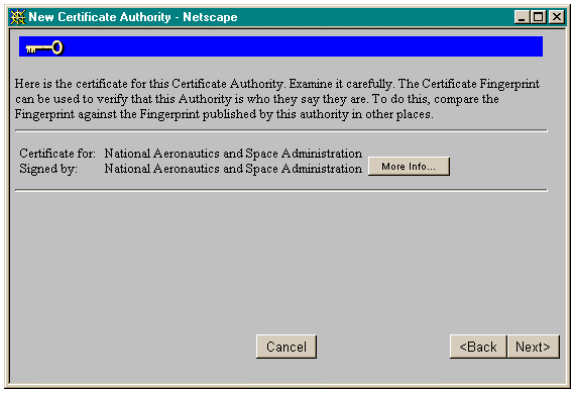
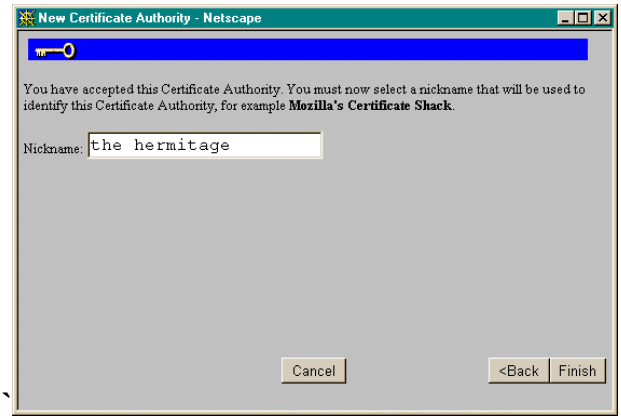


Figure 3-6 PDMS Acceptance Screen 5

Continue on to the next screens, where the user will provide an easy-to-remember name and select whether the user want to be warned when sending personal information over the network.



1Figure 3-7 PDMS Acceptance Screen 6

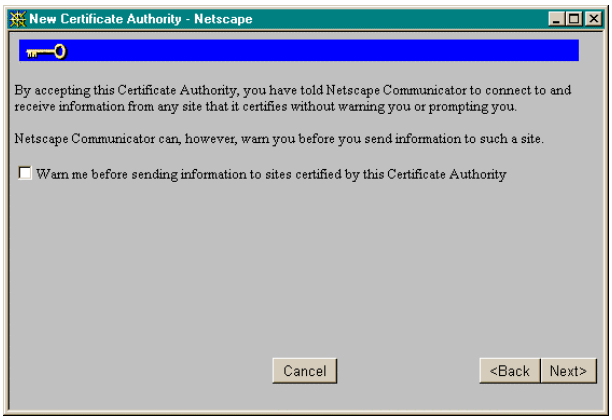
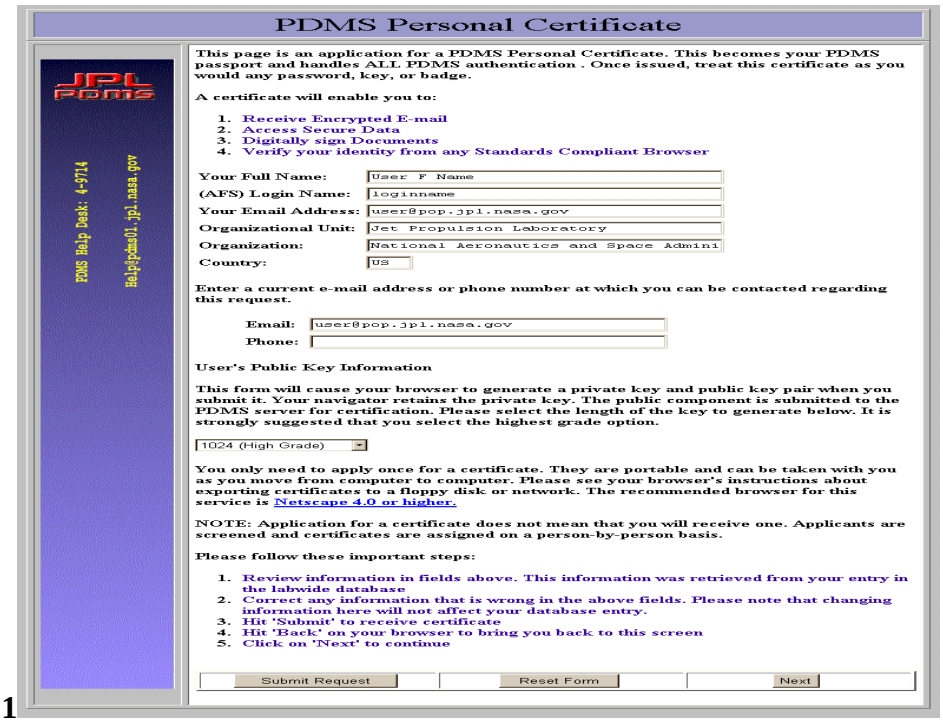


Figure 3-8 PDMS Acceptance Screen 7

The user was just authorized to send personal data over the network, to allow the start of the process to issue a certificate. Next the user will input personal data like the user's name, e-mail address and AFS login, so if the user doesn't know that information, look it up. At this screen the user will be applying for a personal certificate to access PDMS.



1

Figure 3-9 Input Personal Information 1

This screen will first be submitted then follow the directions. When the user is returned to Figure 3-2 screen again click on "next", and follow the instructions. The user should save this certificate to a place on a local drive. Click "back" from top of browser, returning to Figure 3-9 and click "Next."

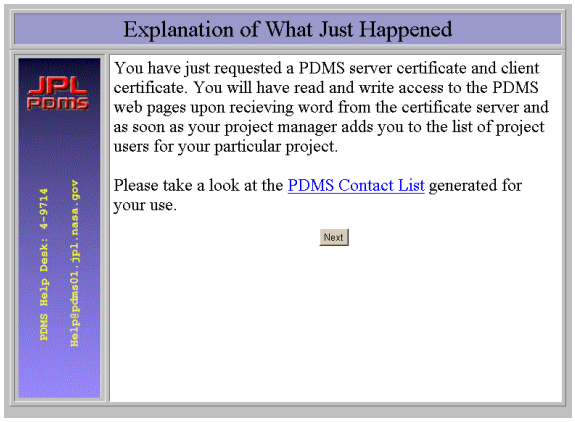


Figure 3-10 Showing last 2 screens

Read the information carefully. This certification process is not instantaneous; there's a human in the loop.

3.2. ACCOUNT RESTRICTIONS

Users will be restricted in their access to PDMS by user class. Since any user with an internet connection and web browser can only view PDMS files without an account, that type of use is the lowest class and does not need an account. For another user needing any modify abilities, an account will be required. Access for read/write is also determined by the user's project.

3.2.1. PDMS User I.D.

The system administrator will assign user IDs. They are to be unique to each user and should match those of the user's AFS account. If they don't match then contact the system administrator, or your supervisor. What the user will be able to do will be delimited by his assigned *user class. User classes* will be determined by user's security requirements. User will pick the class when in the Account Wizard. Of course the selection will be subject to approval of the manager.

3.2.2. PDMS Accounts

PDMS accounts are configured by project, with read-write access. Read only accounts are available over the web and do not need to be requested.

AFS accounts are required, for full read, write and create capabilities, and may be requested by going to URL FTTP://eis/fil

Note: PDMS users must adhere to the JPL Automated Information Security (AIS) Program as outlined in JPL D-7223A, JPL D-7973 and JPL D-7155A. The AIS Program outlines proper use of accounts, maintenance of passwords and the responsibilities of users accessing JPL information systems. *[checking for accuracy]*

3.3. WORKSTATION CONFIGURATIONS

PDMS can be accessed using a P.C. running Windows 95, or Windows NT, the Apple Macintosh, UNIX and VMS workstations using JPL supported communication and networking software. From each class of computers, users can access basic PDMS functions in Netscape Navigator® or graphics-based (X-Windows) mode. PDMS can be accessed using hardware and software outlined in JPL Supported Core Products Document Older PCs such as IBM XTs and ATs, any PC with a 80486 CPU, or that are currently not on Core products Guide list, are not supported by PDMS.

3.3.1. Intel, "IBM clone" PCs

P.C configuration must be a 80586 (Pentium) 75mhz or better, with 16 MB RAM minimum, 32 MB RAM and a 1.2 Gigabit IDE hard disk are recommended. Also required, 100 MB available for communications software, SVGA Monitor. Either Windows 95 or Windows NT operating system is required. The PC used will also need an X Window simulator such as Reflection-X properly installed and configured. See section 4

3.3.2. Apple Macintosh PCs

Specific questions regarding workstation configuration or network support should be directed to JPL's Help Desk at ex. 4-HELP (4-4357).

3.3.3. Engineering Workstations

The following engineering workstations can connect to PDMS using the default communications and network configurations as installed in their respective operating systems:

Sun Sparcs, DECs, SGI R4000s, HP 9000s

The "bottom line" is that any workstation that supports TCP/IP and telnet can connect to PDMS. Note: PDMS will be "officially" supporting all X-Windows access, and access via Netscape Navigator®.

3.4. CONNECTING TO PDMS

PDMS connectivity is based on the TCP/IP protocols, which JPL supports on HINET. To connect to PDMS, workstation hardware and software must be able to communicate using the HINET. This section outlines the procedure for connecting to PDMS.

3.4.1. Connecting

Accessing PDMS requires that the workstation has either Ethernet capability (e.g., Sun, HP, SGI and DEC workstations typically have built-in Ethernet) or already has a properly configured Ethernet card installed. JPL's Help Desk Consultants can assist in configuring both hardware and software allowing connection to PDMS.

Typical Ethernet Connection Procedure

The following is an example of a PC accessing PDMS using the JPL supported software Reflection X. Run Reflection X. Access PDMS via Ethernet by initiating a "telnet" session. The user login ID and password can be remembered by Reflection, and automatically inserted at login. After successful connection, the PDMS opening screen will display. The user need only enter at the command line, "pdms" [lower case required] and a PDMS session will be launched. Screen captures and much more detail are provided about this process in section. 5.0.

For specific operation instructions, refer to Section 4.0 ACCESSING PDMS USING X WINDOWS, OR THE REFLECTION X USER'S GUIDE; otherwise use a unique user ID, and password.

3.4.2 Connecting with unknown equipment.

Please call the Help Desk at 44357, for instructions for operating equipment.

3.4.3. Connecting via modem

When this service becomes available, detailed instructions will be included.

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3.0 WHAT'S NEEDED
5.0 ACCESSING PDMS USING X WINDOWS

4. ACCESSING PDMS via NETSCAPE NAVIGATORâ

Netscape Navigator is a powerful web-browser with which the user is probably already familiar. If the user has been using Internet Explorer changing over to Netscape Navigator will not be difficult. Any questions or problems concerning the use of Netscape Navigator® Navigator can be answered by the JPL Help Desk at 4-4357.

4.1. WORKING WITH RECORDS

Just as a user browses the World Wide Web, he can browse the PDMS database. The URL is https://www-pdms.jpl.nasa.gov.

After successfully navigating to the PDMS site, the user will be presented with a number of choices. The screen captured below displays these choices along the top. Remember access is limited in Netscape Navigator® and the user may encounter occasional error messages when browsing this web site. The button bar is also shown.

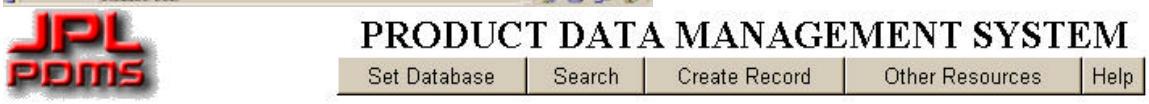

Figure 4-1. PDMS Home page This figure shows an overall view of the PDMS home page and a close up of the button bar near the top.

Options available for working with records are shown in Figure 4-1. These operations will be described in the following sections. The user can now navigate to a project and view or if the user has been granted proper authority, modify any of the records associated with that project. One can view meta-data records, or view the actual files represented by the meta-data. These files can be drawings, documents or specifications of various kinds. Granted the necessary authority, the user can attach or detach files or modify records several ways. With no authority other than what it takes to operate a browser on the World Wide Web the user can view and copy out many, if not all these files.

Note: One may encounter some occasional problems when trying to go from the meta-data records, to the files attached to them. If no files are showing as attached to the particular record, then it is quite possible that the data has not been entered. Attaching necessary files, and entering this data, will be the responsibility of the project that owns the data. If the user is certain that there should be viewable data present, call the PDMS Help Desk at 4-9714 or e-mail at e-mail address Helpdesk@pdms01

4.1.1. Set Database

The Set Database operation is not currently operational, as of this writing 12/9/97

4.1.2 Search

In figure 4-2 the initial search is shown. After clicking on the "Search" button the user will begin the search operation. He may search for documents, drawings or anything that is shown in the "Record Types Selection" menu.

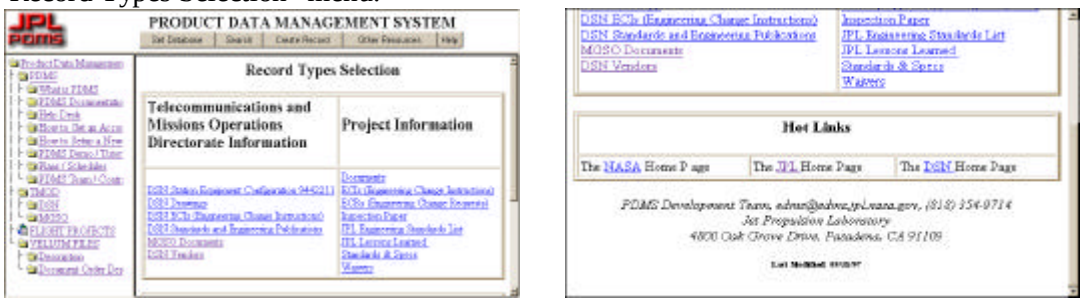

Figure 4-2 Record search initial screen top (L) and bottom (R). This screen comes up when the Search button is clicked. AT this writing only "Documents" are searchable.

Figure 4-3 Document search data field. The user will input the search criteria data in the specified fields to search for a document.

Note: Only two projects are available at this writing, 12/9/97. They are MIRO, and PDMS. Projects will be added to the project pull-down menu as they are added to PDMS

Create Records

The Create Records operation using the Netscape Navigator® browser, is not currently working as of the time of this writing 12/9/97. The only way currently available to create records is through the Sherpa® database interface, which is described in detail in section 5.4.2.

Other Resources

Other Resources operation button is not currently working as of the time of this writing 12/9/97. Other resources are available using the Sherpa® database interface. This is described in greater detail in section 5.4.x.

Modifying Records

To modify a record, first the user must have selected the record he wishes to modify and pulled up the meta-data screen on that record.

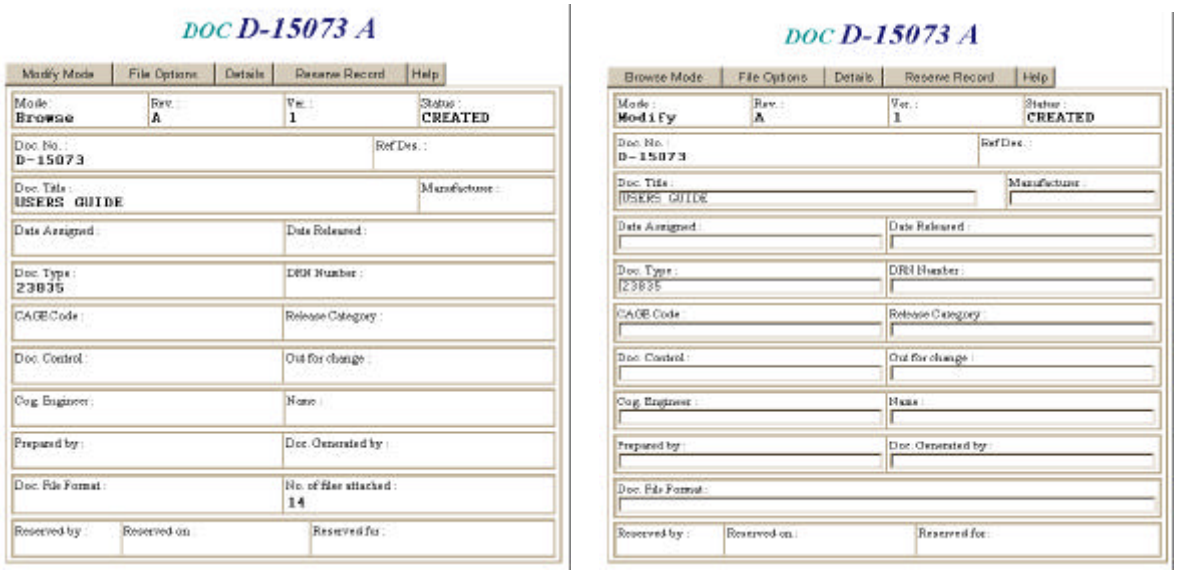

Figure 4-4 Modify record screens showing on the right a meta-data record in browse mode, and left one in modify mode.

The "Modify Mode" button toggles between that and "Browse." As it does so does the contents of the first field telling the user which mode the record is in. As the names imply, in browse mode on the left the user can only view the record or its contents, and reserve with proper authority. In modify mode, the user may change the record or its contents, as well as reserve it.

Reserving Records

When you attempt to reserve a record, you will be asked for your password. This is necessary to verify user class. It determines if you have the authority to reserve records. Like in the screens shown in Figure 4-4, the "Reserve Record" button toggles between that and "Unreserve Record." It cannot be stressed too often that a record reserved by someone other than yourself, is not available for any operation except browsing, and copy out.

4.1.7. Releasing Records

This function is currently only available in the X Windows access. See section 5.4.x for details

4.2 *WORKING WITH FILES*

The records created in PDMS are called meta-data. Meta-data exists for each record in the PDMS vault. Files attached to records can be viewed and modified. The following sections explain most of the procedures necessary to accomplish this.

4.2.1. Viewing

The most common activity on PDMS is the viewing of attached files. Domain specific access control will determine which users may browse PDMS to view drawings or documents, or other files attached. From specific JPL domains you simply navigate to the PDMS web site, select a project, and a list of documents like the one in Figure 4-6 can be brought up.

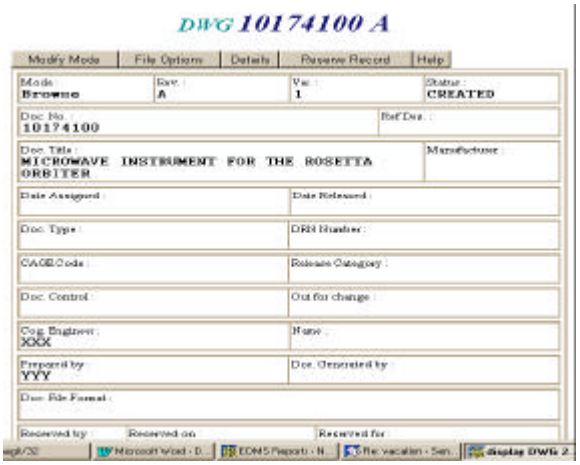

Figure 4.5 Meta-Data screen Return to section 4.3. **Figure 4-6 File list screen**

Simply select the record that you wish to view by clicking on the number on the left with you mouse. A meta-data screen will come up that looks like Figure 4 -5. The "**File Options**" button at the top will bring up the "File List" screen (figure 4-8) where the user selects which activities to perform with the files listed, or needing to be associated with any particular record.

Select a file from the list and click on one of the following options:

View File | Attach New File | Check Out | Check In | Copy Out | Detach File | Help

Figure 4-7 Close-up of File Options Button Bar cut from top of "File List" screen in Figure 4-8. The functions in this button bar are discussed in detail in section 4.2

Return to section 4.2.2. Return to section 4.2.3.

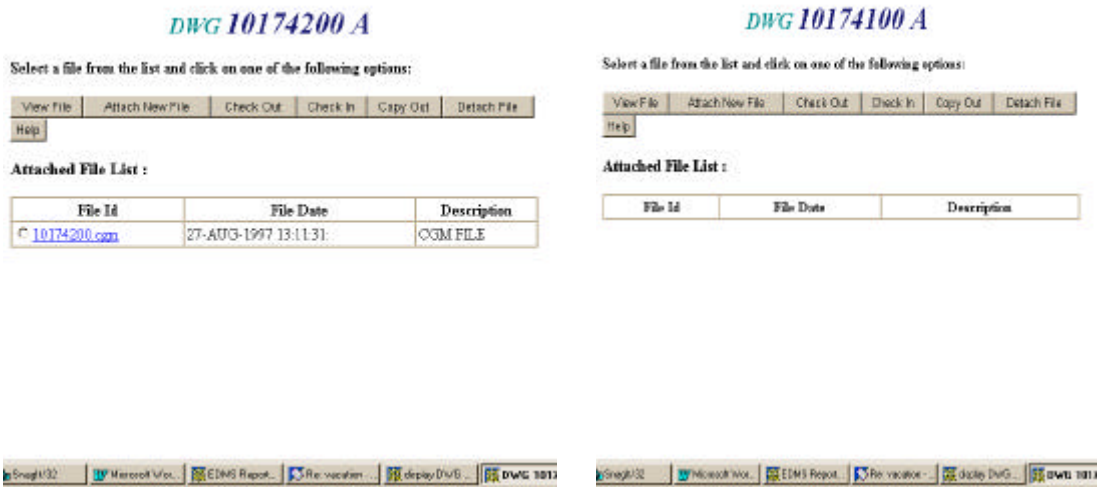

Figure 4-8 record of attached file(s)(left) and a record showing no files(right)

Viewing the screens illustrated above, is an option only after clicking on "File options" from the screen in Figure 4-5. There are no files attached to the record shown in Figure 4-8 right, therefore nothing can be viewed. If however, files are listed, as in the case of Figure 4-8 left simply select the desired file number by selecting the round circle next to it with your mouse. Then select the "**View File**" button at the top left. Before the file is displayed a warning screen will be shown to which the user must agree by clicking "**OK**" at the bottom. Then the file is opened and displayed using whatever tools necessary, like Word or Acrobat, or AutoCAD. For now if a particular tool is not available the file will not be properly displayed. However a planned enhancement to PDMS will correct this.

4.2.2. Attaching files

Suppose the user has been working for a project and has created drawing for the record in Figure 4-5. If this drawing has been saved anywhere on the user's desktop, and if the user has been given the necessary authority to manage records, the drawing file can now be attached. Click on the "**Attach New File**" button. The following series of steps is necessary to complete an attachment. Henceforth in this section, it will be assumed that the user has the necessary authority to complete any transaction.

Figure 4-9 Attach new file page, all fields filled

The "File" field is found by clicking on the "**Browse**" button, and going to the location where the file the user wishes to attach resides. The field will be automatically filled in when the "**Open**" button (not shown here) in the last step of browsing, is selected. Then Figure 4-10 is displayed. Click on "**Done**" to exit to previous page.

Figure 4-10 Successful attachment screen

4.2.3. Detaching Files. View Figure 4-4

Detaching a file is the same as deleting it. The file is no longer associated with the record, and is deleted from the PDMS vault. The process is fairly straightforward. Once again, select from the project the record you wish to modify. Then from the button bar at the top select "**File Options**" and that screen select the file you wish to detach, and then select the "**Detach File**" button. Read the following screens carefully, they demonstrate the detach process, and give a fair explanation of what has happened

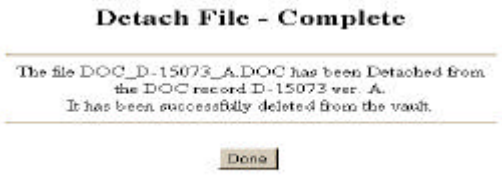

Figure 4-11 Detaching File screen **Figure 4-12Detach File Completed screen**

4.2.4. Check-in

In Check-in mode, the record is reserved,"locked" and is available for modification and check-in to the user who checks it out in. All other users are prevented from doing a checkout or a check-in of a reserved record. A reserved record and its files can be copied into a different directory for review or the existing information can be used as the starting point for a new project.

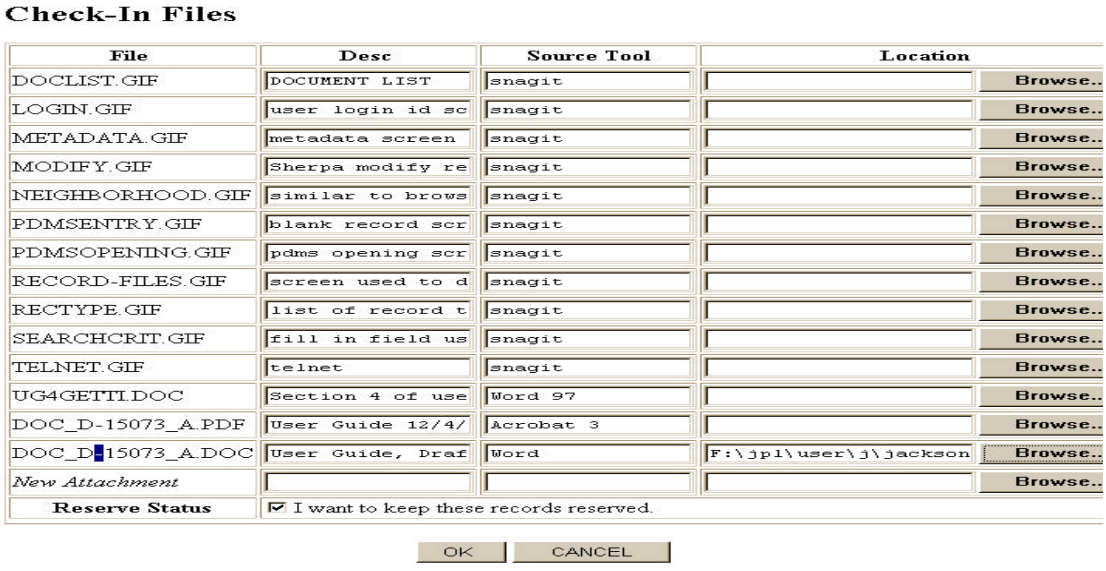

Figure 4-13 Check In Files Screen

Note: Observe the bottom line in the above screen. Reserve [record] Status. If the box has a check in it you are indicating you wish to continue to reserve the record. Pay attention to this box when checking in records, and be sure to clear that check if this record including all its associated files is not reserved to one specific user. Unless it is not to be available for modifying operations, that box should be empty.

4.2.5. Check out files

The process of checking out a file copies that file to a place you specify, and reserves the record with which that file was associated until you release it. The figures below show the steps necessary in checking out a file.

Figure 4-14 Check Out file screens, initial (L) and final (R)

4.2.6. Copy out a file

The process of Copy Out writes the selected file to a place specified by you. It does not reserve the record to you, and anyone can copy out a file, even those just browsing the WWW.

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5. ACCESSING PDMS IN X WINDOWS

If the user is familiar with the processes detailed in section 4.0 Getting Started with Netscape Navigator®, then this section will be more easily understood. The Sherpa interface described here is not as intuitive it could be, that is to say it does not anticipate what the user is trying to do. You have to know many details of how it works, but all of the functions available under the browser are here also. Also note that the first subsection applies only to PC's. If you are using a SUN® then you can go directly to the section 5.2 Launching a PDMS session.

5.1. Logging in on using a PC and Reflection X

After successfully launching Reflections-X, the system requests a user ID and password as shown below. Remember that the ID and password are "case sensitive" and there are no spaces in the user ID or password. For example, ***FLASH&RUN*** and ***flash&run*** are not the same. The system views upper case and lower case characters in IDs and passwords as being different. Reflections X can be set to remember the user ID and password. See the reference manual that came with the software.

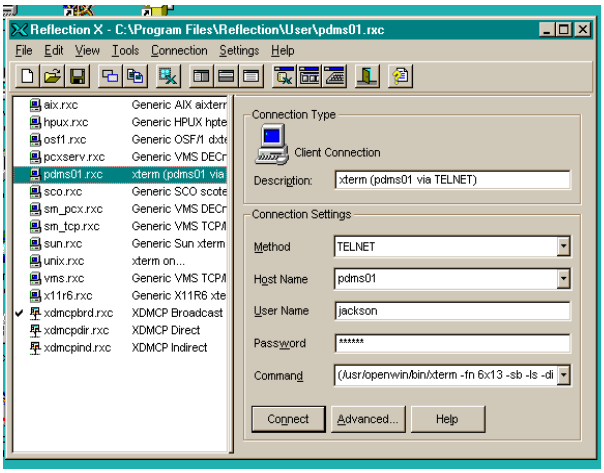

Figure 5-1 Reflection X opening screen

5.1.1 Login incorrect

If the user's password and/or ID are incorrect, PDMS allows five (5) unsuccessful attempts to login before the telnet connection is terminated. Each time, a pop-up window will appear, similar to the one below. Reenter the correct ID and password

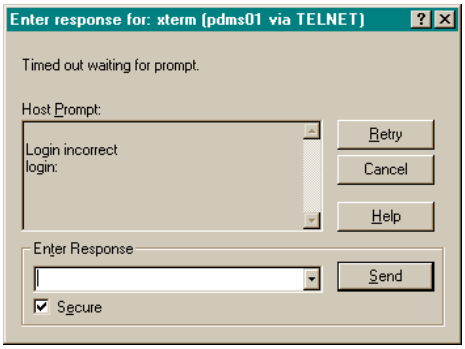

Figure 5-2 Login error screen Typical Error Screen. Remember that "Reflections" can be configured to remember the user's password and login ID. If the user is getting this screen, it could be this information is not correct, and it needs to be edited, or there is a problem with the user's account.

5.2. Launching an PDMS Session - all desktops

Once the user ID and password are accepted, the initial PDMS command screen, pictured below will be displayed. The user need only type the command "pdms" (lower case required) at the command line, and the database user interface "Sherpa" will load and run.

> **Note for SUN® users :** The same is true on a SUN® workstation. After the user connects to PDMS via telnet, and puts in his ID and password correctly the same instructions apply. Input pdms" (lower case required) at the command line and the database user interface "Sherpa" will load and run.

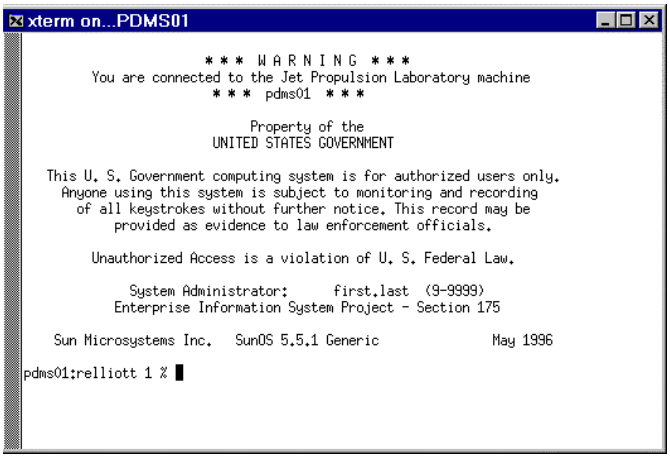

Figure 5-3 PDMS Opening screen 1

5.3. Menu Overview

PDMS utilizes graphical user interface. This interface will allow the user to create, edit, and delete meta-data records. It will allow attaching of actual data files, of all kinds to these meta-data records. This interface and most common tasks are described in this section and subsections.

5.3.1. Sherpa

Sherpa is the program interface with the database on the PDMS system. It has been successfully loaded when the screen in Figure 5-4 is displayed.

Figure 5-4 Sherpa Welcome Screen This screen welcomes the user to the PDMS database user interface program Sherpa. This screen is only displayed briefly then is followed by the screen covered in the following section.

5.4 Using the Interface

The Sherpa interface is versatile and powerful, but it is not readily intuitive. The user must be familiar with the program's functions and layout.

5.4.1. The Control Window

After successfully launching Sherpa, from PDMS, and after the welcome screen. The user interface provides this screen for accessing the database, and a large variety of functions. These functions are launched from the buttons along the top, and will be covered in detail.

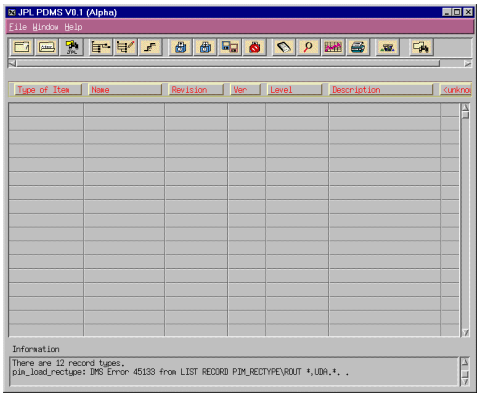

Figure 5-5 Control window

The screen shown in Figure 5-5 is referred to, as a “Control Window.” It first appears after the Sherpa logo has been displayed and closed. All the functions the user performs will be initiated from this window. After a particular function has been selected, new windows will pop up, and on this screen the fields will no longer be blank.

Non-Intuitive Warning

Watch for error messages appearing on the bottom of this screen, generated by actions being attempted from a subordinate window. This can be confusing, if the user hears an error beep, sees that the action requested is not working, but does not know where to look to see an error message explaining why the action was not performed.

4.4.2. Create Records

The first virtual push button from the left shows the icon of a closed folder. This is used to create a new record. After the user selects the kind of record to create and fills in the necessary fields the record will be created with the data that was entered. One needs to be a project user, and have the authority to create records. The initial screens, pictured in figures 5-6 and 5-7, are the Menu Screen and the Create Record Screen for a document. The user will note that there are a number of record types that can be created in the menu, each is different, and requires some information that is unique to that type of record. These are listed in the screen on the right in figure 5-6

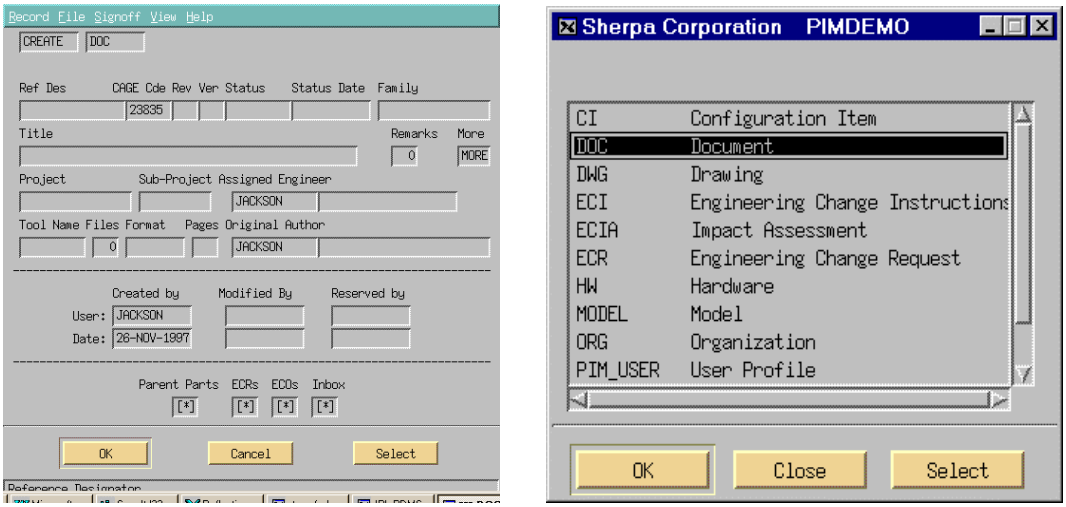

Figure 5-6 Creating a record showing the list of record-types available to be created on the left, and a typical create a document screen on the right

5.4.3. Modify Records

The user who wishes to go into modify mode, must first be in a record screen similar to figure 5-7.

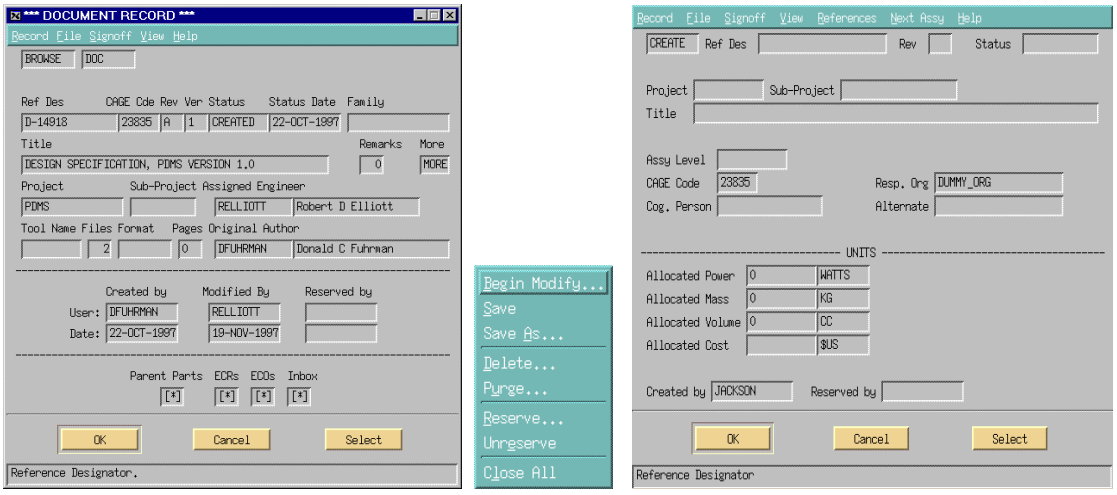

Figure 5-7 A document record (left), the Record menu (center) and a CGI record (right), meta-data is displayed in formats such as these. The pull down Record Menu is used to select Modify mode.

Then the user simply points to the word "Record" and pulls down a menu as displayed in figure 5-7 Selects "Modify" from the selections, and proceeds to make any changes permitted.

5.4.4. Attach files to record

5.4.5. Set Record Hierarchy

5.4.6. Search For Record

5.4.7. Checking in a Record

5.4.8. Checking out a Record

5.4.9. Reserving a Record

5.4.10. Viewing an Attached File

5.4.11. Setting/Viewing Record Status

5.4.12. Using the Binoculars

5.4.13. Promoting and Releasing Records

5.4.14. Using the Trash Can

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6. GENERATING REPORTS

This section will be written as the ability is developed

6.1. Using Standard Reports

Contact the PDMS Help desk with any requests you may have for reports

6.2. Creating Custom Reports

In PDMS will be outlined in more detail in subsequent versions of the PDMS User's Guide.

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7. COMMAND OR MENU SUMMARY

This section is to be edited. Most, if not all of this information will be replaced with updated information, or removed entirely.

7.1. Finding Records

7.2. Viewing Records

The HELP option provides PDMS on-line help and information about PDMS.

7.3. Logging out and disconnecting from PDMS

Each PDMS session must be closed by the PDMS user through the following steps.

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URL to be supplied later

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